

Doing an Evergreen Installation (EG Grand Rapids, 2010)

God is in the Details Stuff we didn't have time for but think you might like to know. This is excerpted from the text version of our OLA Super Conference 2010 presentation. Please feel to use or share this as you like.

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Testing:

- difficult to get staff to test something that they won't be using for a few months
- if I had to do it again, I'd outline testing exercises & checklists and give deadlines to results reporting
- we set up a wiki to allow for questions & comments and problem identification - it worked but I think our approach was just a little too casual for some
- lack of official documentation is not hugely problematic for the circ/cataloguing/information services staff testing/training because lots of libraries have written their own and will share it and their training documentation - help is either a google search or mailing list post away. Using Cynthia as their "consultant" our front line staff more or less trained themselves; similar for cataloguing staff
- lack of documentation for systems and admin tasks in the client is very problematic – the mailing lists are crucial for help
- Staff team motivation pre-live was difficult, folks just weren't as engaged as Robert and I were but they did do what needed to be done
- Implementation followed our then current work flows but we also tried to identify areas to change/improve whenever possible or necessary
- Quickly came up with a standard response to staff questions and concerns: "Do you want EG to work that way because that's the way SIRSI works or because that is the way you want to work?"

Going Live:

- Planned for spring/early summer 2009 - had access to our old system until March 31, 2010 - so date could be flexible
- Had to use SIRSI for booking & circulating DVDs & videos - special status for videos and DVDs in EG while we worked with Equinox on setting up a contract for them to develop a booking module (that was beyond Robert's capabilities & would have taken too much of a time commitment for him to learn how to do it) Equinox busy but the goal was to have something in place by the end of 2009, drop dead date was March 31 as that is the day we give up SIRSI for good - we got there in January and started using the booking module in February so ahead of our drop dead date.
- did a very soft launch and really spent the summer working out any issues that we hadn't found in our pre-live testing - spent the summer making lots of tweaks, learning lots more about EG

- Chose not to take circ history with us - felt it added a level of difficulty to migration that we didn't want to take on. Joy of academic libraries is that most of our patron database turns over every 3-4 years, in our case as a community college, its more like every 2-3 years, so I wasn't worried about tracking folks' history the way a public library would. We do manual circs stats for books (literally note the count on the books once a year) so that was covered too
- Since we could continue to use Sirsi & could still get overdue notices etc. from it, we set a universal due date in Sirsi so that everything would be overdue and we'd know what was out & could track returns.
- No reserves module - we now make reserves notes in the marc 506 field (restricted access) and keep records in a spreadsheet.
- Front line circ staff were pretty much up to speed and ready for September. Reference staff however hadn't really done their homework and we had lots of questions from them in those first few weeks of the fall semester Belatedly set up an OPAC committee to go over things, teach each other features and functionality, make a wish list for changes and developments – that is going well now
- Serials records look pretty lame, but collection is small, hasn't really been a problem, new full Material Holdings Format Data support for serials in 1.6 - we'll fix 'em this summer
- Reports – though somewhat difficult to learn to do, it is possible to produce amazingly granular reports from the client, also possible to do SQL queries. building reports templates requires knowledge of the database structure but we have basic circ stats and item counts on a monthly basis & now some overdue and booking module reports

Mistakes: Authority Records:

- Link to video: <http://www.youtube.com/watch?v=Bp8Ji23jao0> (created by Cynthia's husband, he's not a fan of comments, hence the "no comments allowed" , feel free to show this, use it anytime)
- thought we didn't need authority records - reasoning at the time, now realize it was faulty - a vendor who does use authority records will be doing the vast majority of our cataloging - why do I need to have a set to add to and maintain?
- Aside from forgetting about things like endings for dates in name authorities when someone dies - e.g. right now J.D. Salinger is still alive in our OPAC. I'll explain what else was wrong with not having them when I do the OPAC demo.
- Can get authority records from Marchive, Backstage, we're hoping to get ours from our former consortium, still working on that – don't know if there are costs involved or not
- Update March 2010: Conifer gave us a copy of their authority records, Robert loaded them. So now we just have to figure out a way to update them.

Mistakes: Fines

- we did lots of testing around notifications - because email notifications were completely new to us and this was an area where, over the summer, the circ staff were doing a lot of this and reporting back their findings and questions.
- Little did we know that yes, overdue notifications were working but fines weren't actually accruing!!
- Communication break-down! Somehow, somehow we got to a stage where the circ folks thought Robert was working on a fix and were trying not to bug us but Robert and I thought things were working because we hadn't heard otherwise so I think it was early September when a casual "so when do you think fines will be working?" question woke us up and within a day or so, we were finally collecting fines.

Things we Like/Demo:

- We added numbered hit list, bold/colours added
- no stop words "not a love story" title search It does not use stopwords, because real users search for titles like "It" or "ToBe Or Not To Be"; also, in French "or" and "th?" are quite meaningful.
- The relevancy ranking is based on IDF but includes boosts for matching keywords in the title or author, exact matches, etc. Searches can be scoped to include results only from a single library or a subset of libraries, and can be filtered to only return results with available items of a specific material type / intended audience. (credit to Dan Scott in an EG mailing list post)
- authority records - canada search in ours and UPEI or Laurentian – drop down folders/organization doesn't exist in Mohawk's because we don't have any authority records loaded (March 2010 Update – authority records courtesy of Conifer, now added)
- online videos
- Reserves keyword = "fennell reserves" to list all at that campus - search by campus and/or instructor/course code - all added to MARC 506 field, record keeping done in a spreadsheet.
- staff didn't like the relevancy ranking at first and asked us to switch to a new to old default but we've convinced them that's a library thing that we need to let go of – and is easy enough to re-order results from new to old.

Before You Start:

- Take a resource inventory: funds, skills, hardware, etc...
- Join Evergreen lists and check out Evergreen site
- Make friends in your IT department
- Develop a data migration strategy
- Review all your options:
- do it yourself
- work with other departments in your org
- join/start a consortium (Eg. Conifer)
- outsource (Eg. Equinox)

Setting up a Test Server:

- Set up Summer/Fall 2008
- Find an old computer and install Linux.
- Set up networking and install software prerequisites.
- Install latest version of OpenSRF.
- Install latest version of Evergreen.
- Configure system
- Load marc and user data. Migrate data to new system.
- Customize and enhance.
- Discover best practices for security and backup.

Setting up a Production Server:

- Purchased and set up August 2008
- Purchased and set up August 2008 – Mohawk College project approved by IT committee for \$18,000 – we didn't use all that money. Hardware Cost = \$6000
- DELL PowerEdge 2950 in college main server room
- paid our consortium for our bib records - .25 per record
- importing our student records took us into relatively undocumented territory - developed a custom solution using some SQL scripts.

Develop an Implementation Plan:

- Review testing and trial results
- Purchase/request real server or look into virtual servers
- Install software as you did on test server
- Load real data onto server and develop good plan and procedures to update and backup data as needed
- Customize and enhance and test before going live
- Decide on a launch date
- Fix, enhance and upgrade as needed

Delegate and Be Flexible:

- Decide on responsibilities - delegate, if possible, to get others involved.
- Set a flexible and realistic staff demo or launch goal.

Systems Skills:

- Linux Administration - knowledge of shell commands, and good admin practices
- Database Administration - Experience with SQL, relational databases, postgresql commands, backup procedures
- Web Design/programming - important for OPAC customizations. (XML, XSL, JavaScript, CSS, DTD, Dojo toolkit, etc...)
- Programming Skills (Perl, shell scripting, etc...) - At least know how to read scripts.

Top 5 Systems Things to Learn:

1. Postgresql and SQL tricks (read documentation on postgresql site and Dan Scott's SQL intro for Administrators from coffeecode.net)
2. Evergreen database structure (explore)
3. Evergreen file structure (where the files are and what they do - explore)
4. How to use error logs for troubleshooting
5. How to find help from the Evergreen community

Top 5 Administration Things to Learn:

1. The pros and cons of open source software
2. Planning and Project Management
3. Software Testing with Front End Users
4. How to trust your staff, you have to let them in
5. How to find help from the Evergreen community

Successes:

- We did it & Staff like it
- It just feels good (openness, learning, community, etc.)
- For others to judge

The Future:

- Add ebooks & websites to the catalogue
- Enhance Reserves access - links to bookbags in a Libguide?
- Fix serials records
- Add online "location" to improve records for e-resources (see MacMaster university's non-Evergreen catalogue for example)
- Overview calendar for booking module
- Documentation
- OPAC needs "discovery" features - tagging, reviews, - Vufind? Library Thing for Libraries?
- ???